I MARKETING CONDITIONS

Cambridge Full Flavor

All direct accounts with the exception of PayLess Northwest and Safeway, Bellevue, have accepted. Due to vacations and SAM Seminar, both to be re-presented in mid-August. General response seems to be favorable. Retail efforts should reflect good movement as the use of the prebooking form has added significantly to the initial levels of distribution.

Virginia Slims Ultra Lights

Initial presentation have been favorable. McLane Northwest and Fred Meyer accepted. Anticipate acceptance from Safeway, Clackamas.

General Marketing Conditions

Reaction to the price increase has been minimal. The two increases generated some confusion among the direct accounts as well as confusion in pricing to the retail outlets.

The Seattle market remains relatively strong with Boeing's continued success. Also, the growing process of the Navy in Bremerton and Everett has a positive economic impact.

In Oregon, employment is low as compared to the total figure for the United States. The bulk of new businesses reflects the growth of the service industries rather than the high wage dollars of the still faltering lumber company.

Taxes and Government Affairs

In Oregon, the Multnomah County officials have banned smoking all all county buildings except for the county jails. Effective date; January 1.

Washington HB 209 is unclear whether cigarettes sold to the Indian reservations must be stamped.

II MAJOR COMPETITIVE DEVELOPMENTS

American

They now offer a larger value fixture, 5-wide, previously 3-wide. It has a 6th shelf option, 7 cartons high on top, with a total capacity of 160 cartons. No information available on payment as yet.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Reports of an offer of $250 bonus payment to accounts for a 50% or more row gain on current contracted fixtures. No documentation available to confirm this offer, no success to date.

Malibu is being sustained by $3.00 coupons; otherwise sales are very slow.

Pall Mall Filters showing very slow sales. Distribution and inventory throughout the Section are minimal.

Brown & Williamson

Their sales force has been concentrating its efforts on Falcon Lights. Despite good distribution of the brand, sales are poor. Movement in discounted displays is limited and retailers report very few repeat customers. B & W reportedly pays the distributor's sales force .25¢ per carton for each carton of Falcon they sell. The product has very slow movement but very distribution.

Normal factory couponing of Raleigh, Barclay, Belair and Richland. Richland and Kool Milds have been featured in a 2-for-1 promotion; Richlands reportedly sell quickly from the displays.

L & M

Nothing to report.

Lorillard

They supposedly have a new contract similar to B & W's whereby a bonus is offered for the number of packings over 20 carried by the account.

Conversion of the True packing is complete and in full distribution with no increase in sales.

Usual couponing and some 2-for-1 promotions on Newport, Kent, and Old Gold.

R. J. Reynolds

Reportedly, they are being audited next month which is resulting in heavy efforts to replace our permanent POS, especially outdoor pieces.

More Lights 120's introduced, apparently to replace the 100's. Supported with heavy POS. Doral Ultra Lights have also been introduced. Too early to comment on movement of these brands.

In several supermarkets in the Spokane area, they are placing $5.00 coupons to the purchase of 2 cartons on Winston, Camel, Salem, and Vantage. The cartons are banded together for purchase.

They have begun realigning their merchandising space, moving Century to the side and positioning Now on the front shelf.

Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Generics

Retail pricing on Best Buy is $1.00 less than generic price, impacting on B & W's generic supermarket sales.

Falcon Lights are being couponed $1.00 off per carton, pricing them 10¢ below generic pack price.

Black & Whites couponed $1.00 off per carton.

III TRADE CLASSES

Rapid Cigarette Service of Vancouver has been bought out by Rich & Rhine of Portland as of July 6. This forces even greater pressures on Apollo Distributing for all upcoming 2-for-1 promotions.

Sheehan Majestic of Missoula will reconsider our FVB at a later date according to FVB Manager, Tom Wilhelms. Reason given: our price increase was higher than the competition.

The Washington distributors remain active maintaining a fair trade law in the State. Competition from wholesale grocers are their greatest concern.

McLane Northwest and CoreMark continue to battle each other throughout the area. McLane's new ordering categories for their accounts have begun to win back business they had previously lost. Retail response is that McLane is far more receptive to their needs at this point.

Carrs, 4-store chain in Anchorage continues to refuse generic cigarettes. To date, their policy is not to carry any generic in any category.

DM Cockman has sold in our value units to all Safeway stores in Alaska. These should be placed in the next month.

Drive n Save has moved their headquarters from Eugene to Grants Pass, Oregon.

Tradewell, 31 stores, in Seattle now has a new CEO, Jerry Valenti. No background on him as yet.

Larry's Markets, 4 stores, are all non self-service. They have developed their own rack which is locked. Reportedly they are receiving payments from American and B & W.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

IV KEY ACCOUNT CONTACTS

John Mayer, V.P. McLane Northwest, with SAM Chuck Parker. Introduced Chuck to John, positioning our new Senior Account position. They seemed to be very enthused with that concept and our focus. They were appreciative of our intent to work in a most cooperative manner with them. Presented Virginia Slims Ultra Lights which was accepted.

Judy Graff, Buyer Safeway, Clackamas, with SAM Joe Palermo. Discussed general business conditions and introduced Virginia Slims Ultra Lights. This will be taken before committee next week. Do anticipate prompt acceptance.

Larry Moore, General Manager, Apollo Distributing with SAM Joe Palermo. Discussed general business conditions and conducted Cambridge Full Flavor count/recount.

Gene McIntosh, VP Plaid Pantry, with SAM Joe Palermo. Discussed general business conditions, specifically reviewing their plans and intentions to get back into cigarette carton merchandising. As a result of going non self-service they had a significant volume decline and are anxious to recoup their losses. They are very concerned about pilferage and security system. We discussed with them our limited self-service agreement as well as the possibility of working and developing fixtures for them. Gene was very interested in our involvement and appreciative of any efforts we can make in that area.

Darrell Webb, Buyer/Merchandiser Fred Meyer Variety, with SAM Joe Palermo. Discussed general business conditions and introduced Virginia Slims Ultra Lights. Also received a request from Darrell to develop a Business Review for their new VP/Merchandising to be conducted in early September. They are very interested in package fixturing and Darrell is supportive of our units. We are very hopeful this is a positive step to gaining some commitment during the 4th Quarter.

V MERCHANDISING PROGRAMS

With limited quantities of M-5's, we are proceeding slowly with 7-Eleven. In those accounts with the new unit, the size is very bulky and creating compliance problems. Many of the franchise operations look to move the unit. The franchise are also receptive to Lorillard and R.J. Reynolds counter displays. This appears to be a direct result of the size of our unit.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Re-signing of Plan A's has been slow to this point. Now that all contracts and materials are available, all Division Managers are contacting key accounts with their Sales Reps to gain more rows for Philip Morris.

Placement of carton racks is slow, however, we are picking off target accounts. SR Mark Becker has commitment from three high volume Osco Drugs in the Seattle area.

Marlboro Sports Bag continues to get very good response. Anticipate excellent use of materials.

We continue to make headway with our value centers. Remains very viable when an account does not utilize 3 or 4-foot section in their department for generic products. Division Managers, Area Managers, and SAMs are targeting influential accounts for their use of supplemental hardward to gain Philip Morris rows and inventory.

Fred Meyer Variety is receptive to our package fixtures. We have the support of their Buyer/Merchandiser. The entire program will again be re-presented to their new VP Merchandiser in September. We have been told that once a commitment is made, it will be for three years. We are optimistic about our chances.

Marlboro Shopping Baskets have met with positive response. They have been accepted in Safeway, Clackamas, Fred Meyer, Johnny's, Dari Marts, Kienows, and Piggly Wiggly, to name a few. This will certainly provide us very good exposure in these accounts.

VI SECTION ACTIVITIES

The Section Office was relocated on July 17.

Conducted Section Management meeting for new Plan A and supporting agreements. It was well received. We anticipate the use of supplemental fixtures to be a great enhancement in the Section.

Conducted Section Management meeting on brand introduction of Virginia Slims Ultra Lights and B & H Lights Box. The three Supervisors did an excellent job in presenting these brands. They set a very positive example which was received in kind.

Met with ADRS Alford along with our two SAM's, Joe Palermo and Chuck Parker to discuss and position their responsibilities, involvement, and communications. Both men are eager and enthusiastic about the new role and focus of consultative selling.

Along with MPA Griego, attended the MPA seminar in Richmond. Once the system becomes on line and functional, it will obviously be very effective and efficient in assisting our national accounts in developing their cigarette category.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

VII SALES SERVICES

Walter Beyer and Bill Dorr followed up with us to make our move a very smooth transition.

The computer hardware for the Smart desk has been received. We are awaiting diskettes to make it functional. Also awaiting the furniture for the hardware.

VIII SALES DEVELOPMENT

Received all training materials, overheads, PPP's, for our management meeting for Virginia Slims Lights and B & H Ultra Lights Box. This allowed us time to prepare and present in a knowledgeable manner.

Subsequent materials, such as trade circulars and allocation sheets arrived either the day of, or the day after the meeting.

IX MEDIA

Nothing to report this month.

X ASSOCIATIONS/CONVENTIONS

Attended Washington State Association of Tobacco Candy Distributors convention with SHA Soares and Area Manager Davis. Greatest focus was on their concern over the Fair Trade Bill in Washington and the impact of Costco and other discount operations. They also expressed their concern over the lack of availability of a variety of our product during the recent price increase. Attendance was good. They are appreciative of our support to their annual convention.

XI SSM MISCELLANEOUS COMMENTS

None this month.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

I. MARKETING CONDITIONS

Cambridge Introduction

Initial indications from retail are the Cambridge full flavor is performing above expectations. Consumers are responding in a positive manner to the overall pack design and the limited promotional activities.

Shipments to wholesale through 7/17/87 were approximately 1,182 cases. This exceeded allocated amounts by 182%. At chain level, we have distribution gap in Safeway, Lucky, and Raley's.

Sales Trends

Section 71 sales year-to-date increased approximately 3.0%. Volume of 5.01 billion units was the strongest in history for six months. Major customers impacting our sales included: Customer Company - up 150%, 86.7 M to 215.2 million units. Factors included reduced pricing to their customers, installation of PM carton and package fixtures in the second quarter. Safeway's volume up 25% - 219 M to 247 million units. This chain has been increasing the size of their carton fixtures. McLane-Pacific is up 26% - 366.8 M to 464.3 million units. They continue to be very aggressive and are adding to their customer base.

New direct customers within the section have made some contribution to sales gains. Approximately 159 million units have been added vs. 281 million units by existing customers. Payless Drugs added 40 M units. Costco opened six new stores, adding 71 million units. Price Club added 16 M units and Certified Grocers' expansion north added 32 million units.

Economic Trends

Population shifts continue to be recognized from the San Francisco Bay Area to the Central Valley areas. As employment locations move away from downtown San Francisco, people are moving further out to afford housing. As can be seen from the map, several cities and towns in Stanislaus County have experienced +25% growth in population. These population shifts will no doubt impact upon our business in the future and cause eventual adjustments in our coverage patterns.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

II. COMPETITIVE DEVELOPMENTS

American Tobacco

30-pack set sells of Pall Mall filters with $.20 off per pack stickers paying the retailer up front $6.00 - very little movement. They are also featuring $2.00 off coupons on Luckys and Pall Mall 100's on value center displays.

Brown and Williamson

Sales Reps are busy with the introduction of Capri. B&W has three promotions to help promote their new brand. The first offer is a two-for-one promotion which is available in either a 10, 20, 40, 60, or 80 unit. The retailer receives $.50 per carton display allowance for placement and sales to date have been fair. The second offer is a 24-carton floor display with $2.00 off coupons on each carton. The retailer is paid $5.00 for placement and sales have been fair. The last segment of this promotion is a 2-carton permanent pack display. The retailer will be paid $5.00 per month for the 6-month duration of the program.

Sales Reps' objectives for the introduction of Capri are as follows:

1. Make 10 calls per day.
2. Place at least one display per call.
3. Place six pieces of POS in each account.
4. Obtain 90% distribution within 30 days.

The sales force is also utilizing a coupon packet that is similar to our CIP packets. The packet is worth $9.00 and features four $2.00 off coupons for carton purchases and a coupon for a free pack.

B&W has brought in additional sales force personnel from Arizona and Nevada to the Bay Area to gain quicker distribution for Capri. Distribution is being captured at a very good rate, but sales appear slow on live product.

R. J. Reynolds

Twelve sales personnel in Northern California have elected to take the company buyout. This reduction in the RJR work force will no doubt have a positive impact on our business. Several of the personnel leaving have quite long tenure with the company.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Retailers continue to praise RJR for the way they handle their coupon reimbursement program. Their self-addressed stamped envelopes are given freely to retailers to insure quick compensation and to show their appreciation for handling their coupons. PM's lag time continues to be four to six weeks.

More Lights 120's two-for-one displays are being placed with limited success. Temporary POS featuring this line extension is being placed on pack and carton fixtures throughout the Section. This brand appears to have no affect on PM sales or promotions to date.

RJR is mailing out questionnaire brochures for people to voice their opinion about smoker's rights. The original of this brochure was sent to Steve Sabella.

III. TRADE CLASSES

Wholesale

Core Mark

During the pre-book phase of the Cambridge Full Flavor introduction, we experienced quite a bit of resistance from Core Mark sales people. Pre-book orders were forwarded to Core Mark sales people to punch in on their hand -held computer. In many instances, the orders were discarded. Because of the commission structure involved with Major Brand and Best Buy, distribution channels for Cambridge and other value brands are impeded. To illustrate this point, while section shipments of Cambridge Full Flavor exceeded allocation by 187%, the Core Mark warehouses only ordered in an extra 20% above allocations.

Supermarkets

Petrini's 11 stores

This chain is seeking a buyer. Reports are that Market Wholesale is interested in entering the retail end of the business.

Nob Hill 15 stores

This chain is in the process of opening a new store in Martinez, CA.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Convenience / Convenience Gas

There continues to be great interest in the three-pack purchase concept. Much of this interest has been due to the article in "Convenience Store News" concerning Charter Marketing. The availability of low cost three-pack banners or posters would be quite beneficial.

Southland 7-Eleven Central Pacific

Southland is re-establishing their interest in carton selling. Large posters with a photo of Marlboro, Newport and Kool feature the $9.29 carton price.

We understand that Southland is in the process of selling the company which makes their new security fixture. This might have some impact on upcoming placements at retail.

IV. SSM CONTACTS

Capitol Cigar - Sacramento Gene Sosnick

Made presentation with SAM John Zank to all sales people and management at Capitol. Cambridge Full Flavor video was shown and the D.I.P. allowance of $.25 per carton discussed. We anticipate excellent participation from Capitol sales people in this promotional effort.

Core Mark - Bakersfield Tony Chicca

Discussed overall business trends with Tony. We have experienced a 18.2% gain in business during the first half of 1987. We estimate a 60% share of market in the Bakersfield area.

Strickler Wholesale - Bakersfield Fred Strickler

Discussed overall business trends with Fred. Thanked him for his support of our efforts to defeat tobacco tax increases.

IV-A. SAM CONTACT

71-41-00 James Canley

7-Eleven Central Pacific - Pleasanton, CA 500 stores

On June 30th and July 16th, I called on Rigo Bolanos, Buyer Merchandiser for 7-Eleven. The purpose of our meetings was to discuss Cambridge pre-booking, value centers in 7-Eleven, and M-5 participation.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

I developed a prototype pre-book for him and delivered them. I also provided him with specific on our AV.

The pre-books were distributed to his field reps via district managers for them to sell and qualify for gratis. Based upon preliminary reports, we had poor participation. I do not have an exact count at this time; however an estimation of 600 cartons were sold.

At this time, we also decided not to pursue the value center program. Based upon participation in the pre-booking of Cambridge and 7-Eleven district managers' acceptance of this program, we decided it would be a great expense for us to incur, with very little commitment of stores complying. 7-Eleven had requested we customize the AV fixture to adapt to their fixture.

In addition, 7-Eleven field reps pre-booked our M-5 during the month of June. Based upon questionnaires received from 7-Eleven, they pre-booked 171 M-5's. Our Sales Reps pre-booked 82 for a total of 253 displays.

Safeway Northern California - Fremont, CA - 244 stores

On June 29, I met with Dave Cabral of Safeway regarding their chain accepting Cambridge Full Flavor kings and 100's. We reviewed the value brand category and Cambridge Lights sales since they have been on the market. We also took a look at Full Flavor sales in his marketing area.

Dave's only reason for not accepting the brand is lack of merchandising space. On my previous appointment, I presented our AV value center. After his reviewing the merchandising payments, he stated the payments are attractive, but he cannot give more floor space to a declining category.

I then offered to merchandise the product on our existing space on the carton fixture. He objected to that because he did not want to confuse customers and employees by having value brands in two different locations.

He did recommend we present to Art Patch at Corporate to eliminate the Doral fixture and merchandise value brands in line with premium products. Dave also stated he would be making that recommendation to his boss, Chuck Aldridge, to make the same presentation to Art Patch because of the number of value centers on the market and the lack of merchandising space.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

I will keep him informed on Cambridge Full Flavor sales and re-present the brand at a later date.

Liquor Barn - San Leandro, Ca - 44 stores

On June 30th, I met with Phil Less, Buyer Merchandiser for Liquor Barn stores. My purpose was to determine if any changes had been made in the organization, or new goals set for 1987 due to their recent buyout.

Phil indicated nothing has changed or new goals set. I also explained we'd like to take a closer look at their merchandising needs in the cigarette category and present a proposal to make this category a more profitable one for them. I am to contact George Baker, Store Stocking Supervisor for Liquor Barn, and present the program to him.

On Monday, July 25th, George wants me to contact them to set the appointment, which will basically be to do some fact finding, determine their needs and goals, and then develop a proposal that will meet their needs.

Melvin Sosnick Co. - Santa Clara

On four different occasions, I met with Sosnick -Santa Clara to monitor movement of Cambridge Full Flavor and to insure that the pre-book orders were delivered to the appropriate account. On each occasion, the buyer, Art Shayawitz, input information into the computer to track the product's movement and gave me the results. He also input the pre-book orders into the computer while I was there to insure me that orders were placed and shipped to retail. As a result, to my knowledge, all orders pre-booked through Sosnick-Santa Clara were delivered to the field.

Fleming Companies - Pleasanton, CA

During this reporting period, I met with Marc Lee at Fleming Companies on numerous occasions. The majority of our meetings were about Cambridge Full Flavor and getting them properly set up. On all occasions, the buyer assured me the product is set up and is in the warehouses; however, reports I am receiving from the field are telling me different.

Before we introduce another new product, I want to meet with Marc to determine what all he expects from me and what our people should do to guarantee that these orders are shipped to retail on time.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

71-42 John Zank

Lucky's Stores - San Leandro 159 Stores

Buyer Dave Ebert is interested in expanding his warehouse space for cigarettes, so we could increase the number of packings available. He indicated that his operations department would have to approve this and has asked me for a market share report indicating the number of packings in the top 92 and 95% that he is not carrying. I will indicate to him that I can make a presentation to his operations people regarding cigarette profitability, if it would support his efforts.

Lucky's recently dropped Players 25's kings; however, I feel acceptance of Virginia Slims Ultra Lights is promising.

Raley's - Sacramento 48 stores

Raley's will be opening a new store in Vallejo in August and then will begin to expand into San Francisco. I am pushing for additional package fixturing when possible. Raley's is still not ready to get into the generic cigarette business. They have not yet authorized Cambridge, Doral, or Falcon in any of their stores. However, the products are available in some stores where the manager has received several requests. We currently have distribution of Cambridge Lights in 14 Raley's stores.

Circle K - Sacramento 137 stores

Division management is anxious to place the new PM fixtures as soon as they are available. They have asked me to keep them informed of the logistics as they develop.

Customer Company - Benicia 122 stores

All AG units in Customer Company stores have been added and Cambridge Full Flavor has been shipped to all stores. They have also indicated that they still want the 3-pack and free soft drink promotion as soon as it is available. They also desire to have tobacco accessory modules installed in at least 20 stores.

Capital Cigar

I recently attended the Capital Cigar sales meeting and discussed the introduction of Cambridge Full Flavor. The sales staff and management of Capital were very pleased to have us there. Capital's business remains down about 10%

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

for the year; however, they intend for this to increase as they anticipate picking up some local chain accounts very soon.

McLane - Pacific

McLane's business with us is up 31.4% year-to-date. They did an outstanding job with Cambridge Full Flavor bringing in 128 cases - almost twice their allocation - and shipping it all to retail. Cambridge Full Flavor was featured on the cover of McLane's weekly promotional sheet. McLane continues to be very interested in the fixturing we are providing to Circle K and AM/PM. I will keep them informed as we progress with the fixturing in these accounts.

Certified Grocers - Pleasanton

Buyer Bob Miles has indicated to me to be sure and invite all of Certified's senior management to any special activities or functions that are available. I indicated that I have done so and will continue to do so in the future. Certified's Northern California Director, Dave Payne, will be attending our golf tournament on 7/25/87.

Save Mart - 51 stores - Modesto, CA

Save Mart will be opening a new large superstore in Modesto on 7/29/87 and will continue their aggressive expansions throughout the remainder of the year. Since Save Mart is supplied by MTC, they would be a principal purchaser of our generics if MTC were to begin buying them. I am working with MTC on developing the value centers for this account if they were to begin buying Famous Value generics.

V. MERCHANDISING PROGRAMS

Carton

Plan A penetration has exceeded 92% of all eligible accounts. Category I contracted rows are 86.6 per store and Category II rows are about 71 rows per store. These figures represent a 20% increase in Category I rows and a 9% increase in Category II. PM products occupy approximately 36% of all available rows at retail.

Merit Sea Coaster

Final utilization figures for this promotion indicate a 90% utilization of shipped displays. Additional displays sent to the San Francisco market area in July will most likely be used for a chain.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

AV/AG

There was 5.5% increase in value center placements during the June cycle. We anticipate even greater increases as a result of the July Cambridge activities.

Package

Plan B/M penetration was approximately 43% of all pack selling outlets. We anticipate gains of about 245 M-5 displays in Southland 7-Eleven stores during the upcoming month.

BV/BG displays increased approximately 15% during the month of June. We expect more gains during July, as a result of the Cambridge Full Flavor introduction.

Marlboro Lighter Promotion

Due to the late shipment of materials, most of these displays are being placed in August, once the initial Cambridge coverage has been completed.

VI. SECTION ACTIVITIES

Marlboro Summer Sampling Program

The Marlboro summer sampling program appears to be as successful this year as in the past. All comments from DM's indicate samplers are having no problem in getting Marlboro samples into the consumer's hands. We did have some problem in receiving samples this year. In many divisions, we lost our regular people who had worked the program in the past, and we had to start all over; however, we have very capable individuals and comments indicate they wish to work future programs.

B&H Inner-City Program

This 9-week program is presently in full gear. The samplers are working 30 hours per week to support this program and to gain trial for new B&H smokers. We recommend shipping the 2 for 1's one time on future programs. Split shipments tend to confuse the issue, especially when we are also working Cambridge.

C.I.P.

Usage for intercept packets dropped to about 5.8 per day. This sudden decrease of almost 2,200 coupons was due to late shipments of June's supply.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

On-Carton Coupons

This activity increased over 20% during the June sales cycle. A total of 24,117 cartons were couponed during the month. Approximately 71% of this activity was on behalf of Cambridge.

VII. SALES SERVICES

Systems

Examination of the Second Quarter TRAC Q.A.R. printouts once again reveals many discrepancies. All management levels from Division to Supervisor to Section report problems in verifying the averages being reported on the Q.A.R. Since this system is the overall basis of our retail productivity management, I feel it is essential to rectify the situation.

Retail Account Summary reports for June dropped all spinners from the data base.

Office Administration

Furniture ordered for SAM/MPA expansion on January 26, 1987 is now scheduled for delivery on or about August 26, 1987.

Merchandising Materials

Security shields for System 2000 fixtures placed in Alpha Beta and Frys are in need of replacement. The current system needs to be revised in order to better meet the daily use demands being placed on them.

VIII. SALES DEVELOPMENT

The new computer hardware and software made available at our Richmond meeting will greatly enhance our presentation capability. The training methodology for this type of software use would have been more effectively administered on an individual region or section basis.

IX. MEDIA DEVELOPMENTS

Activities arranged by Vinnie Wiener for customer entertainment at the recent baseball All-Star game were top notch. We received many, many positive comments from the customers attending. Such events are of genuine value to our business building efforts.

X. MEETINGS / ASSOCIATIONS

Attended a four-day seminar in Richmond involving use of new computer hardware and software.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Conducted new product management meetings on Virginia Slims Ultra Lights and Benson and Hedges.

XI. SSM MISCELLANEOUS COMMENTS

During the recent seminar in Richmond, I had the opportunity to visit Mr. Bill Pierce in our Customer Services Department. I would recommend that at some future time, all SSM's and MPA's be given the opportunity to receive more information on this group's function.

Conducted our annual PM Patrick Media Golf Tournament on July 24th. Over 100 people attended the event. Virtually all customers had very positive comments.

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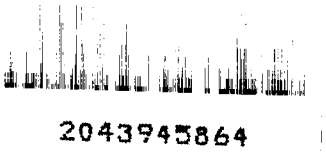
Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000



Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

I. ECONOMIC AND MARKETING CONDITIONS

Cambridge Full Flavor Price/Value

The following accounts have yet to approve distribution of this brand:

Ralphs - pending	Safeway - pending
Williams Bros.	Thrifty Drug - pending
Stop N Go	Calif. Target
Luckys - awaiting appt.	Sav-On OSCO - pending
Hughes	P & M Stations
Albertsons - rejected	

Part of the prolonged deliberations on this brand from our major accounts has been the poor performance of the Cambridge Lights. The couponing efforts on our part has not been adequate enough to sustain distribution levels.

Retail distribution has been good for this new brand, we expect 70-75%, but with the sporadic supply of coupons, maintaining distribution will be difficult especially in light of the competitive pressures.

Pre-booking efforts went well, however, follow through on deliveries of these orders were mixed. Core-Mark/Glaser Bros. sales people at various houses took these orders back to the store to verify orders and signatures. I presume these people felt they were being looped out of the picture and not getting credit for the sale. Also Core-Mark/Glaser Bros. were charging anywhere from 70¢ to $1.20 per carton more over their Best Buy brand. These problems have been brought to the attention of Ron Kentish. He will address this with the operations people.

Virginia Slims Ultra Lights Box & Benson & Hedges Lights Box

Direct account sell-in has just begun, but the feedback we've received has been positive because of the strength of our Benson & Hedges and Virginia Slims in this market.

Account	Accept	V/S	B&H
Core-Mark/Glaser	X	X	X
Alpha Beta	X	X	X
Certified Grocers	X	X	X

Sales Trends

We continue to experience a decline in volume through the first half of 1987. However, sales did improve in June because of customer buying with the price increase. Section Sales -7% and -2% in the Marketing Area. There will also be some sales shifting with Certified Grocers closing their house in San Fernando, shipping coming out of their Northern California center.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Economic Trends

Anti-smoking activities continue to gain constant exposure. Some of our accounts have mentioned the recent article in Business Week Magazine, 7/27/87, it doesn't speak well for the future of our industry.

A recent victory, Beverly Hills city council has amended their no smoking ordinance for restaurants. The law is being changed to designate up to half of the restaurant space as a smoking section.

II. COMPETITIVE ACTIVITY

American

Will be introducing Malibu within two weeks. This is a popular priced brand and will carry a $3.00 off coupon. No other details are known at this writing.

Pack promotions on Pall Mall Filters - 20¢ off per pack. Carton promotion is $2.00 off on Pall Mall Filters, Lucky Strike Filters/Lights and $1.00 off on Carlton. Retail movement is fair.

Brown & Williamson

Falcon is currently being promoted via 10¢ off per packing (stickers), merchandised in temporary and permanent two (2) carton displays. The price at retail 69¢ per pack. Cartons feature $1.00 off coupon. P.O.S. activities has been fair, it seems that most of there efforts are directed at Capri. Sales have been slow.

Capri retail introduction started on 7/13/87. All vacations have been cancelled for the month of July. Supermarket reps are being used to expedite introduction to all retail accounts. Two for one product being offered, though I don't have specifics on gratis. In addition, a 40-unit single-pack plastic set/sell, which carries a $5.00 retail payment. P.O.S. placement very visible. Capri is generating a lot of trials, a number of which are Virginia Slims consumers.

Military

Falcon sales have been poor. They continue to place 25¢ off coupons on all GPC Generics, 50¢ coupons on all Kools, $2.00 coupons on all Viceroys, Raleighs and Belairs and $1.00 coupon on Falcons.

Liggett & Myers

Sales reps placing a 30-carton floor display featuring L&M, Chesterfields and Larks. Attached to each carton is a 3-piece stainless steel eating utensils. Sales are extremely slow.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Military

$2.00 off coupon placed on L&M and Chesterfields in the commissary stores.

P. Lorillard

Promoting Newports $2.00 off carton coupon (3 additional $2.00 coupon mail-in) attached to all self-service retail product, 2 packs with lighter counter displays and 2 pack with bottle of suntan lotion floor displays.

Continuing to work the newly designed True packing while trying to move out the old packing. Placing $1.00 off coupon on the old cartons.

Military

Attaching $2.00 coupons on the Kent and Newport family.

R. J. Reynolds

More Lights 120's are being introduced in a B1G1F promotion. Each unit includes a coupon for a buy 2 get 1 free offer. These offers are being placed in their permanent and temporary displays.

They are also offering a 4 carton temporary counter display with a $3.00 payment.

In Hispanic account, Winston is promoting a buy 2 pack receive a free styrofoam can cooler. Moderate sales indicated.

Century King Size and 100's are being promoted with a $2.00 off carton coupon. Also discounting 25¢ off per carton to the retailer if he purchases this product directly from RJR sales reps. Quantities sold in vary based on retail store volume.

Military

Increased the coupon value on Dorals, $1.00 to $1.50 off a carton.

For 2 weeks they offered a $2.00 off coupon on all Winston, Salems and Camel Filters, then reverted back to the $1.00 off coupon. This was done in the commissaries.

Doral Ultra Lights appears not to be selling very well.

Doral Full Flavor is selling very well because of the continued support this brand gets with coupons and 2 for 1's.

2043945867

Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Generics

Japan Tobacco Company

Alpha Beta has distribution of Mild Seven Lights. Distribution is also being gained in independent outlets. This is supported with B1G1F and a free lighter. Product is displayed in temporary counter displays. This brand does not seem to be generating any repeat sales.

III. TRADE CLASSES

Supermarkets

- Pantry Markets is now known as "Pantry Pavilions".

- Cigarette and merchandising decisions are now the responsibility of Dennis Owens.

- Alpha Beta, La Habra, resigned AV Contract

  96 stores @ 16 rows
  94 stores @ 10 rows

- Safeway, Los Angeles, appointment scheduled for 8/4/87 has been postponed. Mike Pfeil, NYO, will notify us of the new date.

Drugs

Longs Drugs, Covina District, has approved our carton racks (4 x 4 x 4 5th Shelf) for 33 stores (with store managers approval). Only 9 stores currently are self service. A/M Mike Blanco is contacting individual stores.

Thrifty Drug, 550 stores

Presentation has been made on our AV fixture. Indications are good we will secure this placement.

B-4

We are currently are working on a custom display rack for placement in this account. George Moreo has been contacted.

Wholesaler

A-1 Wholesale continues to have cash flow problems.

PACE recently opened up a new location in San Bernardino, all product has been ordered.

Convenience

National Convenience Stores, dba Stop N Go, effective 7/1/87 disbanded local marketing departments in Southern California. Everything is being shifted to Houston Corporate Offices.

2043945868

Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Thrifty Gas & Oil Seventy-seven outlets have been leased to Circle K.

IV. SSM KEY ACCOUNT CONTACTS

Thrifty Drug, Los Angeles, CA - Bob Bennett, Buyer/Merchandiser

A/M Carmen Benitez and I presented our AV fixture, as well as our B display program. Interest was shown for both items. Modification would have to be made on our B's to affix these units to checkout areas.

We also discussed business building opportunities, such as developing a training program for Thrifty supervisors and store managers. This program would encompass industry trends, trade class information, inventory control and ordering. Bob feels this would be very beneficial.

Core-Mark, Los Angeles - Ron Kentish, Buyer

SAM Bern Nilson and myself presented the Virginia Slim Ultra Lights and B&H Lights Box, all packings were accepted.

We also discussed some of the problems we were having with the delivery of Cambridge Full Flavor via the pre-booking forms. Ron assured us that this would be straightened out with operations.

Core-Mark, Los Angeles - Dean Parker, President

SAM Bern Nilson and I met with Dean to introduce ourselves, as well as to present him with the Marlboro Pewter Plate. We discussed business developments in the Los Angeles market and some of the promotions we will be doing through the rest of the summer.

Alpha Beta, La Habra - Roy Popp, Buyer/Merchandiser

SAM Bern Nilson and I presented the Virginia Slims Ultra Lights Box and B&H Lights Box, both packings were accepted. Roy signed the new AV contract.

96 stores @ 16 rows
94 stores @ 10 rows

V. MERCHANDISING PROGRAMS

A. Carton Merchandising Programs

Plan A

The sales force is currently in the process of reviewing and resigning Plan A contracts. Row gap analysis have been provided.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Presently we have 483 independents under contract with an average of 81.1 rows and 1240 chains averaging 90.5 rows. Ninety-five percent of potential accounts are under contract.

Vons

Eighty-five stores with PM fixtures. Fifteen stores will up-grade their low profile rack with a 5th shelf. On all new store remodels Vons will be placing RJR fixtures. The loss of RJR merchandising monies is their major concern. Gary Edwards has indicated he supported our rack program and is attempting to extend our program six months to a year.

Mayfair

Mayfair will up-grade their carton fixtures with RJR racks. Our bonus schedule and payment program excluded RJR by $23,000. However, Mike Strano indicated this amount would cover the loss of RJR's payment for approximately 15 months. Since we cannot provide any guarantees to secure losses after the 15 month period, he decided to accept Reynolds' proposal. PM will secure approximately 100+ rows on this fixture.

Plan A-1

Safeway will be participating in Marlboro Sports Gear promotion (120 unit) week of 8/10/87.

B. **Pack/Counter Displays**

Plan B/M

Presently we have 2172 independents signed and 5843 potentials, 37.1%. Opportunities exist that have been addressed with the sales force.

Marlboro Lighter Display

As expected, this promotion is receiving excellent retail acceptance and consumer trial. Though the materials were received late (end of June), usage will be 100%.

Cambridge Full Flavor 2 for 1

This promotion was a very integral part to the introduction. The 20-unit counter display was an excellent strategy, as opposed to a 40-unit, it was easier to secure quality placements. Additional quantities of 2 for 1 product should be available as backup inventory.

7/Eleven

We are currently placing authorized low profile M-4 display.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

B&H Inner-City 2/1

Divisions 72-01-00, 72-06-00 and 72-09-00 are involved in this program. The first placements of product and materials have been received and placements are 40% complete. No problems encountered with this promotion, retail acceptance has been excellent.

C. **Vending Programs**

N/A

D. **PM Fixtures**

N/A

VI. SECTION ACTIVITIES

Marlboro Summer Sampling Program

Division 72-01-00, 72-07-00, 72-08-00 and 72-09-00 are assigned one sampler each for this program. All materials are received and all samplers doing a good job.

Marlboro Resort Program

Eight bar nights and 10 stores sales have been scheduled.

To date, the only major problem encountered was the lack of sweepstakes boards which were not shipped with the materials. NYO indicated they were not available. Our SAR has improvised one.

Consumer Intercept Program

The availability of Cambridge and Players 25's coupon packets is proving to be very beneficial. S/R's report very good success rate when approaching competitive smokers.

Marlboro/Abraham Lincoln Soccer League

We had 5 samplers at this event. This event was the soccer finals for this league and drew approximately 4,000 to 5,000 people. All aspects of our activities were implemented smoothly.

VII. SALES SERVICES

Section Audit

As of this date we have yet to receive the results report on the outcome of our Section Office Audit and Field Merchandising Programs. Audit was conducted during May 1987.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Smart Desk

As of this date we have yet to receive delivery of our Planning Desk. Originally the desk was due for delivery during Mid-July. All the hardware has been received from Richmond.

VIII. SALES DEVELOPMENT

N/A

XI. MEDIA

N/A

X. ASSOCIATIONS & CONVENTIONS

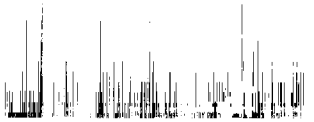
I will be attending the Mexican American Grocers Association Golf outing and Dinner. An organization we need to be more involved with.

XI. SSM MISCELLANEOUS COMMENTS

N/A

2043945872

Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000



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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

I. MARKETING CONDITIONS

Due to the anticipated bi-annual price increase, buying by major accounts was heavy during June. This continued during the increase to take advantage of extra terms and dating with excellent participation in all types of direct outlets. As a result, we were up + 27.0 during June. This put our YTD sales at + 2.2%, the first time this year we have been in the positive column year to date. With our upcoming new brand introductions the third quarter should continue this small increase.

Presently inventory levels of all our major brands are very good at both wholesale and retail.

Cambridge Full Flavor continues to be well accepted at wholesale and retail. Accounts refusing the brand to date include:

Stater Bros. - Will not carry any packings of generic priced items that compete with their house brand.

Big Bear - Carries Doral but is presently not accepting new brands due to lack of warehouse space.

Allsups - Accepted Cambridge with automatic plus out to all stores but their supplier, Affiliated Food, refuses to carry the brands. This affects our distribution in about 275 Allsups and 100 independents.

Quik Mart - Tucson. No generics accepted.

At retail Cambridge is being well accepted with about 85% distribution estimated. A number of accounts that previously did not accept Cambridge now have due to the Full Flavor introduction. The two for ones sold out quickly with many retailers requesting additional promotional offers.

The introduction of Cambridge Full Flavor is definitely helping the entire Cambridge family.

Results of the pre-booking by our sales force was mixed. While the overall numbers were impressive, there were a number of problems, largely due to pricing. The price increases confused many wholesalers and retailers, the generic pricing added to this, and some wholesalers did not cooperate. We received a few complaints from retailers that Core-Mark was charging up to $1.00 higher than other wholesalers for Cambridge and many book orders were refused. Attempts to straighten this out with Core Mark met with the usual resistance. In spite of these problems, however, it is definitely helpful to pre-book product and this should improve during our next new brand introductions.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

II. MAJOR COMPETITIVE DEVELOPMENTS

ATC is preparing to introduce Malibu in Southern California. Selling samples have been received at several wholesale houses. The cartons are sent from the factory with $3.00 coupons attached.

Distribution and inventory levels of Pall Mall Filters are generally poor. ATC is having a good showing on billboards on this brand.

ATC introduced a new value center during July that pays a reported $40.00 per month. To date no chains have accepted this new unit. At the present time we feel ATC will not be able to make any inroads on value centers as long as they continue to pay on RJR or our fixtures.

B&W has generated a lot of interest in Capri due to the packaging and unique product. Many wholesale, chain, and distributors are very positive about the brand.

B&W is obtaining good distribution on Capri in the Southern California area. Sales are slow, however, as initial trial is good with apparently few re-purchases.

Sales on Falcon have been mixed, but generally slow.

RJR continues to heavily utilize "buy one get one free" offers in all areas. Presently they are placing More Lights displays with two for ones. Most accounts have the new packing and RJR Reps. have picked up most all old packings. Sales have been fair, primarily to current More smokers.

Palisade Wholesale in San Diego received 140 12M cases of complimentary Camel Filter and Camel Lights for an upcoming "Buy 3 Get 3 Free" Camel promotion. Palisade is paid for placing the product in "six pack" sleeves.

Magna in Las Vegas is continuing to be promoted by RJR with sales slowly increasing. Some retailers are reporting fairly good sales.

RJR is continuing to push their Doral Value racks in all types of outlets with good success. We have been unable to confirm the payments but they appear to be paying all accounts in their top category regardless of actual volume. One 30 store convenience chain averaging about 150 CPW reported RJR payments at "substantially" higher than ours.

Big Bear Supermarkets in San Diego recently reported that RJR paid them $1400 in advertising dollars to feature Doral in its supermarkets flyers with a price reduction of $1.00.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

III. TRADE CLASSES

Status Vending in Las Vegas is presently negotiating to purchase Sun Country Distributing in Arizona and Sky Top Vending in Nevada. Both deals have gone back and forth for several months and may or may not be finalized. Status recently applied for direct listing. They have approximately 850 machines; Sky Top has 350.

Skaggs Alpha Beta in New Mexico recently reduced their price on all grocery items, including cigarettes. Albertsons and Smiths Food King subsequently reduced the price of their cigarettes setting off a price war. There have been increased out of stocks on all major brands, including ours, due to increased sales in all three chains.

Competition continues to be very keen with the membership clubs. The Pace Club opened in San Bernardino this period and they stated they are working on a program to deliver cigarettes to their members. No further details are known although this seems unlikely considering the low prices at the membership clubs.

The new C.V.S. Warehouse in Rancho Cucamonga will begin deliveries to 35 Consumer Value Stores during July.

We continually receive requests from the membership clubs for our Sales Reps. to headquarter there and turn in spoils. It has been a great help to our sales force to have membership clubs open close to their territories and we have spread out Sales Reps. buying to many of the clubs.

Three new district calls were classified by AM Pignato this period: ARCO AM/PM, Mobil Oil, and Texaco Food Mart. ARCO and Texaco offer potential for p.o.s., overheads, and temporary display opportunities.

IV. SSM KEY ACCOUNT CONTACTS

Bayless Markets — Tom Brunner, Susan Blackburn

Call made with SSS Vaillancourt to represent PM spinners and custom pack rack features for approximately 70+ stores. Bayless is presently installing their own pack racks in all stores. The racks go at each of six checkstands but are actually inadequate for their needs. We agreed to "subsidize" the cost of each rack at roughly what our racks would have cost us, providing we place a Marlboro 4" high strip across the top, we receive approximately 40% of all fixtures which we will planogram, and we place one or two L.P. spinners in each store. Tom and Susan agreed to this and we will begin this with the conversion of 20-25 stores next month.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

V. MERCHANDISING PROGRAMS

A. Carton Merchandising Programs

Safeway Phoenix' AV contract was upgraded from eight rows to 16 rows this period giving us approximately 650 new rows. The new planogram is a vertical configuration.

Our new Plan A now affords us the opportunity to upgrade about 100 independent accounts that are presently signed to ALF, small or standard contracts. Upgrades are also being made on various other Plan A's where applicable during the new brand introductions.

We continue to gain rows on AG and AV racks with both independents and chains. Safeway El Paso was resigned this period for five additional rows giving us 16 rows for our price value packings. This gain amounts to over 300 new rows. We also gained authorization for Plan AV in Petro Stopping Centers, a very high volume El Paso based gas/convenience chain. Each store needs to be sold at the local level with several AV's installed to date.

A number of chains have recently accepted the add on shelf to increase inventory on Plan AV. Bashas in Phoenix increased our contracted rows to 16 by adding a fifth shelf. The Marlboro Sports Gear A-1 promotion is being well accepted by chains. We will have no problem depleting our supply of displays.

B. Pack/Counter Displays

A new Plan M-4 was signed with Super X Drug for all 28 stores this period. This is their first permanent counter display contracted with any cigarette company.

A Plan BV was signed with Woodys, a nine store convenience chain in Phoenix.

Due to the Cambridge introduction, we are having excellent success with new BV displays. It appears we will have 150 new independent contracts during the introduction period.

Terrible Herbst in Las Vegas accepted PM permanent counter displays in all nine of their convenience store locations this month. Depending on location, each store will accept either an M-4, B-4 or B-3. Area Manager Wilson gained authorization for our Plan BV non self-service in 7-Elevens South Pacific Division. This has to be sold in to each Franchise Store in this 350 store division.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

Marlboro Lighter with 2 pack displays were placed in July with excellent acceptance. The lighters were received late and had to be placed during the Cambridge introduction. Most displays sold out in 3 to 4 days. We received many positive comments regarding this outstanding incentive item.

We encountered significant problems with the Cambridge "Heavy Up" program in El Paso. We were advised set sells would be late, then late in reduced quantities, and ultimately they were not received at all. Quantities of 2 for 1's were worked in makeshift displays and Plan B's.

The B&H Inner City Program was implemented recently for the first shipment of 2 for 1's. The second shipment is expected in late July. The displays reportedly moved product quickly.

C. Vending Programs

As noted last month we are finalizing the conversion of Canteen Corp. in San Diego (400 machines) to DataVend.

D. PM Fixtures

We are continuing to meet with excellent success with our low profile spinners and participation in store owned fixtures. In both Smittys and Bayless, we will be placing Marlboro 4" high advertising strips at each checkstand above small store package fixtures. Additionally we will place low profile spinners in all stores. This should result in about 100-125 spinners and Marlboro ads above approximately 650 checkstand pack fixtures. Small gains on low profile spinners are also being made with other supermarket chains including Furrs, Albuquerque.

Albertsons headquarters in Region 6 recently instructed the division headquartered in Albuquerque to remove our AG rack in all 14 stores and place the RJR value racks.

Two new System 2000 fixtures were placed during July in Bashas.

System 2000 placements in independents continues to be slow with approximately 10 placed section wide. Placements will continue for the remainder of the year with approximately 25 stores targeted for placement by year end.

Our sales force is looking forward to arrival of the new overhead pack units just made available. The various sizes, etc. will allow us to compete more favorably with the new RJR units.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

VI. SECTION ACTIVITIES

The Marlboro Sampling Program is running smoothly with no major problems.

In support of the Marlboro Summer Sampling Program, we have conducted two bar nights and three store sales out of the four each of these events planned, with excellent response from customers, smokers and bar/store owners.

Sales Reps. have been busy with Cambridge introduction, Marlboro 2-pack with lighter set-ups, preparation and presentation of System 2000 to independent accounts plus the overall store mission.

Retail Merchandisers have been assisting in placing Marlboro 2 pack lighter displays, and permanent counter displays.

VII. SALES SERVICES

Marlboro Sampler reports were never received by DM's. They are presently utilizing xerox copies of last years reports.

The new Call Summaries are presently being utilized and appear to be a major improvement. DM's have commented they are easier to read and productivity in any given day can be better evaluated.

VIII. SALES DEVELOPMENT

Nothing new to report.

IX. MEDIA DEVELOPMENTS

We continue to see more and more Actmedia ads in supermarket aisles and shopping carts. The ads consistently appear clean and neat with no problems observed.

X. ASSOCIATIONS/CONVENTIONS/MEETINGS

On June 30 I attended a one day meeting at the Los Angeles Region Office conducted by DRS Jim Kuhlman and ADRS Monte Faulk. We discussed various ongoing section programs and other miscellaneous subjects.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

From July 13-16 I attended MPA II training in Richmond, VA with MPA T. Pecanic. This was an excellent training program that gave us "hands on" training.

On July 17 I held a half day meeting with our new Senior Area Managers in order to position their new account responsibilities. Also attending this meeting was DRS J. Kuhlman, ADRS M. Faulk and SSM B. Baker.

On July 21 I held a new brand meeting on B&H Lights Box and Virginia Slims Ultra Lights. This was a little more difficult than other new brand meetings due to our having two different introductions, but all managers left with a complete understanding of all details. Section Sales Supervisors conducted this meeting with all managers attending.

XI. SSM MISCELLANEOUS COMMENTS

Limited field time during July due to 11 days of meetings, two days holiday, four days ill.

We seem to be getting more and more requests for co-op advertising on various brand promotions and introductions from supermarket chains. Perhaps we should look closely at this area for future promotions, particularly on price/value brands.

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000

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Source: https://www.industrydocuments.ucsf.edu/docs/flxl0000